

# Employee Post-Travel Disclosure of Travel Expenses

Date/Time Stamp:

SECRETARY OF THE ARMY

17 MAY 31 PM 1:29

**Post-Travel Filing Instructions:** Complete this form within 30 days of returning from travel. Submit all forms to the Office of Public Records in 232 Hart Building.

In compliance with Rule 35.2(a) and (c), I make the following disclosures with respect to travel expenses that have been or will be reimbursed/paid for me. I also certify that I have attached:

- ☒ The **original** Employee Pre-Travel Authorization (Form RE-1), **AND**
- ☒ A **copy** of the Private Sponsor Travel Certification Form with all attachments (itinerary, invitee list, etc.)

Private Sponsor(s) (list all): Partnership for a Secure America

Travel date(s): May 6-7, 2017

Name of accompanying family member (if any): \_\_\_\_\_

Relationship to Traveler: ☐ Spouse ☐ Child

IF THE COST OF LODGING **DID NOT INCREASE** DUE TO THE ACCOMPANYING SPOUSE OR DEPENDENT CHILD, ONLY INCLUDE LODGING COSTS IN EMPLOYEE EXPENSES. (Attach additional pages if necessary.)

## Expenses for Employee:

	Transportation Expenses	Lodging Expenses	Meal Expenses	Other Expenses (Amount & Description)
<input type="checkbox"/> Good Faith Estimate	\$33	\$90	\$77 over two days	\$167.25
<input checked="" type="checkbox"/> Actual Amount				

## Expenses for Accompanying Spouse or Dependent Child (if applicable):

	Transportation Expenses	Lodging Expenses	Meal Expenses	Other Expenses (Amount & Description)
<input type="checkbox"/> Good Faith Estimate				
<input type="checkbox"/> Actual Amount				

Provide a description of all meetings and events attended. See Senate Rule 35.2(c)(6). (Attach additional pages if necessary.): See attached.

5/31/17  
(Date)

Baxter Carr  
(Printed name of traveler)

Baxter Carr  
(Signature of traveler)

## TO BE COMPLETED BY SUPERVISING MEMBER/OFFICER:

I have made a determination that the expenses set out above in connections with travel described in the Employee Pre-Travel Authorization form, are necessary transportation, lodging, and related expenses as defined in Rule 35.

5/31/17  
(Date)

Shelley Moore Caputo  
(Signature of Supervising Senator/Officer)

## **Description of PSA Retreat Meetings**

### **Meeting #1**

**Guest Speakers:** Ms. Jodi Herman and Mr. Lester Munson

**Topic:** Bipartisan Panel – Mechanics of Negotiating a Bipartisan Deal – US Department of State Reform

Informal conversation on bipartisan negotiating and on the State Department.

### **Keynote Dinner**

**Guest Speaker:** Ambassador Robert Gallucci, Former Ambassador-at-Large and Special Envoy for the US Department of State

**Topic:** US-North Korean Relations

Informal discussion on North Korean threat to the U.S.

### **National Security Council Simulation**

**Mock National Security Advisor:** Mr. Robert Sheldon, Director for Policy – Emerging Threats at the Business Executives for National Security

Simulation roundtable meeting of the National Security Council. We each had a role and acted out a fictional meeting using negotiation skills.

### **Meeting #2**

**Guest Speaker:** Amb. John Beyrle, Former Ambassador to Russia

**Topic:** Future of US-Russia Relations

Informal discussion on the current U.S. - Russia Relations.

### **Meeting #3**

**Guest Speaker:** Ms. Ellen Laipson, President Emeritus of the Stimson Center and former Vice Chair of the National Intelligence Counsel

**Topic:** Challenges facing the Middle East

Informal discussion on situation in the Middle East.

## Carr, Baxter (Capito)

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**From:** PSA Congressional Program <cpp@psaonline.org>  
**Sent:** Monday, March 27, 2017 2:15 PM  
**To:** Carr, Baxter (Capito)  
**Subject:** Spring 2017 CPP - SENATE ETHICS DOCS  
**Attachments:** Senate Ethics Instruction Sheet.docx; Private Trip Sponsor Form.pdf; Retreat Itinerary.docx; List of Participating Senate Staff.docx; Employee Pre-Travel Authorization Form.pdf; Employee Privately-Sponsored Travel Checklist.pdf

**Follow Up Flag:** Follow up  
**Flag Status:** Flagged

Dear Baxter,

Thank you for participating in the Spring 2017 session of the Congressional Partnership Program. We look forward to working with you in the coming months.

As you are aware, every session the Congressional Partnership Program involves a weekend retreat. This session will be held on the weekend of May 6-7, 2017 at the Airlie Conference Center in Warrenton, Virginia. I would like to take this opportunity to offer you a formal invitation to attend the retreat. Please be certain to submit this email **and** the attached documents to the Senate Ethics Committee by **COB April 6<sup>th</sup>** in order to participate.

If you have any additional questions or concerns, please do not hesitate to call me.

Best regards,

Nathan Sermonis

Executive Director

Partnership for a Secure America

1629 K Street NW, Suite 450

Washington, DC 20006

202-293-8580

[cpp@psaonline.org](mailto:cpp@psaonline.org)

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## PRIVATE SPONSOR TRAVEL CERTIFICATION FORM

This form must be completed by any private entity offering to provide travel or reimbursement for travel to Senate Members, officers, or employees (Senate Rule 35, clause 2). Each sponsor of a fact-finding trip must sign the completed form. The trip sponsor(s) must provide a copy of the completed form to each invited Senate traveler, who will then forward it to the Ethics Committee with any other required materials. The trip sponsor(s) should NOT submit the form directly to the Ethics Committee. Please consult the accompanying instructions for more detailed definitions and other key information.

The Senate Member, officer, or employee **MUST** also provide a copy of this form, along with the appropriate travel authorization and reimbursement form, to the Office of Public Records (OPR), Room 232 of the Hart Building, within thirty (30) days after the travel is completed.

1. Sponsor(s) of the trip (please list all sponsors):  
Partnership for a Secure America
2. Description of the trip: Congressional staff weekend of foreign and national security lectures.
3. Dates of travel: May 6-7, 2017
4. Place of travel: Aldie Conference Center, Warrenton, VA
5. Name and title of Senate invitees: See Attached List
6. I certify that the trip fits one of the following categories:  
☒ (A) The sponsor(s) are not registered lobbyists or agents of a foreign principal and do not retain or employ registered lobbyists or agents of a foreign principal and no lobbyist or agents of a foreign principal will accompany the Member, officer, or employee *at any point* throughout the trip.  
- OR -  
☐ (B) The sponsor or sponsors are not registered lobbyists or agents of a foreign principal, but retain or employ one or more registered lobbyists or agents of a foreign principal and the trip meets the requirements of Senate Rule 35.2(a)(2)(A)(i) or (ii) (see question 9).
7. ☒ I certify that the trip will not be financed in any part by a registered lobbyist or agent of a foreign principal.  
- AND -  
☒ I certify that the sponsor or sponsors will not accept funds or in-kind contributions earmarked directly or indirectly for the purpose of financing this specific trip from a registered lobbyist or agent of a foreign principal or from a private entity that retains or employs one or more registered lobbyists or agents of a foreign principal.
8. I certify that:  
☒ The trip will not in any part be planned, organized, requested, or arranged by a registered lobbyist or agent of a foreign principal except for *de minimis* lobbyist involvement.  
- AND -  
☒ The traveler will not be accompanied on the trip by a registered lobbyist or agent of a foreign principal except as provided for by Committee regulations relating to lobbyist accompaniment (see question 9).



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9. **USE ONLY IF YOU CHECKED QUESTION 6(B)**

I *certify* that if the sponsor or sponsors retain or employ one or more registered lobbyists or agents of a foreign principal, one of the following scenarios applies:

☐ (A) The trip is for attendance or participation in a one-day event (exclusive of travel time and one overnight stay) and no registered lobbyists or agents of a foreign principal will accompany the Member, officer, or employee *on any segment* of the trip.

— OR —

☐ (B) The trip is for attendance or participation in a one-day event (exclusive of travel time and two overnight stays) and no registered lobbyists or agents of a foreign principal will accompany the Member, officer, or employee *on any segment* of the trip (*see questions 6 and 10*).

— OR —

☐ (C) The trip is being sponsored only by an organization or organizations designated under § 501(c)(3) of the Internal Revenue Code of 1986 and no registered lobbyists or agents of a foreign principal will accompany the Member, officer, or employee *at any point* throughout the trip.

10. **USE ONLY IF YOU CHECKED QUESTION 9(B)**

If the trip includes two overnight stays, please explain why the second night is practically required for Senate invitees to participate in the travel:

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11. ☒ An itinerary for the trip is attached to this form. I *certify* that the attached itinerary is a detailed (hour-by-hour), complete, and final itinerary for the trip.

12. Briefly describe the role of each sponsor in organizing and conducting the trip:

Partnership for a Secure America (PSA) organized the details for this trip.

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13. Briefly describe the stated mission of each sponsor and how the purpose of the trip relates to that mission:

PSA's mission is to promote bipartisanship in national security and foreign policy. This trip will bring

together staff from both parties to build cross-party relationships and discuss diverse perspectives on

pressing issues in the national security and foreign policy arena.

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14. Briefly describe each sponsor's prior history of sponsoring congressional trips:

This will be the sixteenth such trip of this nature.

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15. Briefly describe the educational activities performed by each sponsor (other than sponsoring congressional trips):

In addition to this congressional staff program, PSA releases high-level bipartisan policy statements on a range of foreign policy topics

16. Total Expenses for Each Participant:

	Transportation Expenses	Lodging Expenses	Meal Expenses	Other Expenses
<input checked="" type="checkbox"/> Good Faith estimate  <input type="checkbox"/> Actual Amounts	\$35	\$90	\$92 (over 2 days)	\$191 conference services (over 2 days)

17. State whether a) the trip involves an event that is arranged or organized *without regard* to congressional participation or b) the trip involves an event that is arranged or organized *specifically with regard* to congressional participation:

This trip was organized specifically with regard to congressional participation.

18. Reason for selecting the location of the event or trip

It is close to Washington, DC but also provides a remote setting that will encourage participants to step outside their daily roles as Senate staff.

19. Name and location of hotel or other lodging facility:

Airlie Conference Center, 6809 Airlie Road, Warrenton, VA 20187

20. Reason(s) for selecting hotel or other lodging facility:

It provides all necessary accommodations in one location that is close to Washington, DC for a one night trip.

21. Describe how the daily expenses for lodging, meals, and other expenses provided to trip participants compares to the maximum per diem rates for official Federal Government travel:

Costs for meals and lodging are \$182 over the course of two days - less than the maximum federal government per diem rate of \$157.

22. Describe the type and class of transportation being provided. Indicate whether coach, business-class or first class transportation will be provided. If first-class fare is being provided, please explain why first-class travel is necessary:

Participants will be transported by a coach class bus.

23. ☒ I represent that the travel expenses that will be paid for or reimbursed to Senate invitees do not include expenditures for recreational activities, alcohol, or entertainment (other than entertainment provided to all attendees as an integral part of the event, as permissible under Senate Rule 35).

24. List any entertainment that will be provided to, paid for, or reimbursed to Senate invitees and explain why the entertainment is an integral part of the event:

N/A

25. I hereby *certify* that the information contained herein is true, complete and correct. (You must include the completed signature block below for each travel sponsor.):

Signature of Travel Sponsor:

Name and Title: Nathan Sermonis, Executive Director

Name of Organization: Partnership for a Secure America

Address: 1629 K Street NW, Suite 450, Washington, DC 20006

Telephone Number: (202) 293-8580

Fax Number: N/A

E-mail Address: sermonis@psaonline.org





## Congressional Partnership Program Retreat Spring 2017

### Saturday, May 6<sup>th</sup>

1:30 pm	Depart from Union Station, Washington, DC
3:00 – 4:00 pm	Arrive at Airlie Conference Center & Check-in
4:00 – 5:00 pm	Material Review and Preparation
5:00 – 5:30 pm	Opening Remarks and Review of Agenda: Nathan Sermonis, PSA
5:30 – 7:00 pm	Airlie House – Meadow Room <b>Guest Speakers:</b> Ms. Jodi Herman and Mr. Lester Munson <b>Topic:</b> Bipartisan Panel – Mechanics of Negotiating a Bipartisan Deal – US Department of State Reform
7:00 – 7:30 pm	East Room Pre-Dinner Reception Informal conversations with guest speakers
7:30 – 9:00 pm	East Room Keynote Dinner <b>Guest Speaker:</b> Ambassador Robert Gallucci, Former Ambassador-at-Large and Special Envoy for the US Department of State <b>Topic:</b> US-North Korean Relations
9:00 – 10:00 pm	East Room After-Dinner Reception Informal conversations with guest speakers



## Congressional Partnership Program Retreat Spring 2017

### Sunday, May 7<sup>th</sup>

8:00 – 9:00 am	Airlie House – Dining Room Breakfast
9:00 – 12:00 pm	*Group A* Airlie House – Meadow Room National Security Council Simulation <b>National Security Advisor:</b> Mr. Robert Sheldon, Director for Policy – Emerging Threats at the Business Executives for National Security
9:00 – 10:30 am	*Group B* Airlie House – Studio <b>Guest Speaker:</b> Amb. John Beyrle, Former Ambassador to Russia <b>Topic:</b> Future of US-Russia Relations
10:30 – 12:00 pm	*Group B* Airlie House – Studio <b>Guest Speaker:</b> Ms. Ellen Laipson, President Emeritus of the Stimson Center and former Vice Chair of the National Intelligence Counsel <b>Topic:</b> Challenges facing the Middle East
12:00 – 1:00 pm	Airlie House – Dining Room Lunch
1:00 – 2:00 pm	Informal conversations with guest speakers
2:00 – 5:00 pm	*Group B* Airlie House – Meadow Room National Security Council Simulation



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## Congressional Partnership Program Retreat Spring 2017

**National Security Advisor:** Mr. Robert Sheldon,  
Director for Policy – Emerging Threats at the  
Business Executives for National Security

2:00 – 3:30 pm

**\*Group A\***

Airlie House – Studio

**Guest Speaker:** Amb. John Beyrle, Former  
Ambassador to Russia

**Topic:** Future of US-Russia Relations

3:30 – 5:00 pm

**\*Group A\***

Airlie House – Studio

**Guest Speaker:** Ms. Ellen Laipson, President  
Emeritus of the Stimson Center and former Vice  
Chair of the National Intelligence Counsel

**Topic:** Challenges facing the Middle East

5:00 – 5:30 pm

Airlie House – Meadow Room

Wrap-up and Departure from Airlie

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**Congressional Partnership Program**  
**Spring 2017**  
**Senate**

*All invited congressional staff members handle foreign policy and national security topics in their professional office capacity.*

**Colleen Berny**

Senate Committee on Homeland  
Security and Governmental Affairs

**Andrew Geibel**

Sen. Bob Menendez  
(D-NJ)

**Molly Carpenter**

Sen. John McCain  
(R-AZ)

**Charles Hockenbury**

Sen. Roger Wicker  
(D-MS)

**Baxter Carr**

Sen. Shelley Moore Capito  
(R-WV)

**Kristen Lee**

Sen. Debbie Stabenow  
(D-MI)

**Melissa Egred**

Senate Committee on Homeland  
Security and Governmental Affairs

**Jared Lennon**

Senate Committee on Homeland  
Security and Governmental Affairs

**William Ellis**

Sen. Angus King  
(I-ME)

**Leigh Maiden**

Sen. Joe Manchin  
(D-WV)

**Adam Farris**

Sen. James Lankford  
(R-OK)

**Mario Semiglia**

Sen. Martin Heinrich  
(D-NM)

**Mikhaila Fogel**

Sen. Susan Collins  
(R-ME)

**Amy Smith**

Sen. Patty Murray  
(D-WA)

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**Andrew Wang**  
Sen. Tim Kaine  
(D-VA)

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